

What I Need to do Your Taxes:

- ✓ Your SIGNED engagement letter
- ✓ A completed Returning Customer Information OR New Customer Information sheet
- ✓ All forms W-2, K-1, and 1099
- ✓ List of itemized deductions:
 - Medical, including miles driven for medical purposes, health and long term care insurance premiums paid, doctors, hospitals, prescriptions, glasses, hearing aids, etc.
 - Taxes paid, including real estate taxes (only those actually *paid* during 2010), sales taxes paid on large ticket items such as boats, cars, RV's, home improvements, etc.
 - Interest paid on mortgages and investments
 - Contributions, broken down between cash and non-cash (such as Goodwill) and itemized by donee.
 - Miscellaneous deductions, including employee business expenses not reimbursed, tax preparation fees, safe deposit box fees, union dues, professional publications, etc.
- ✓ Health Insurance Form 1095 (if you receive one) or Health Insurance Questionnaire if not
- ✓ College costs, broken down by item and student, including cost of books. Include any 1098-T forms you may have received
- ✓ Stock sale information, including number of shares, name of stock, date purchased, date sold, cost and sales price (this should come from your broker marked "Important Tax Information")
- ✓ Business income and expenses, including all 1099's, a list of other income earned, all business expenses, make, model and mileage of vehicle used in business including total mileage and business mileage (ask for a business checklist for more detail)
- ✓ Forms K-1 from partnership, estate, trust, and Sub-S investments
- ✓ Rental property info including location and type of property, rents received, itemized expenses, and large item purchases (these should be listed separately including cost and date of purchase)
- ✓ Name, date of birth, and social security number of all taxpayers listed on return including dependent children or other relatives you are claiming
- ✓ Childcare costs including name, address, and social security (or employer identification) number of provider and itemized by child
- ✓ Other deductions including student loan interest, educator expenses, IRA contributions and moving expenses (moving expenses should be itemized and include distance from old home to job and from new home to job)
- ✓ If you sold and/or purchased a home during 2015, include the settlement statement (HUD statement)
- ✓ If you suffered a casualty loss, details of the loss including dates, type of loss, and listing of items lost. Please be advised this is rarely deductible; if you were reimbursed by insurance or lost less than \$10,000 it will likely NOT be deductible)
- ✓ Any other documents you think might pertain to your return, items you think might be deductible or questions you may have regarding your return.

BARBARA'S TAX SERVICE

(940) 964-2693/Office

(940) 393-3590/Mobile